



2017 INCOME TAX RETURN CHECKLIST
(Please complete and return with relevant information)

Please use this checklist to help organize all the items required to complete your tax return. Please check off appropriate boxes. Please be sure to advise us of any changes in address or marital status.
If you, or a family member, have become disabled during the year you may be eligible for an additional tax credit.

Name: _____

Name: _____

Children _____

Phone: _____ (during day) _____ (home) _____ (cell phone)

Email: _____

PLEASE NOTE: Canada Revenue Agency (CRA) requires that if you owned foreign income producing property with a cost of more than \$100,000 (Cdn) at any time during 2017 you must provide certain information on your tax return. Please advise us if this applies to you.

CRA now requires taxpayers to report the sale of any real estate. This rule will apply even if the property is your principle residence. Please advise us if you sold any property in 2017.

	'X'	Additional information
INCOME:		
Employment: (T4, T4A)	<input type="checkbox"/>	_____
Investment/interest/dividends: (T3, T5, T5013)	<input type="checkbox"/>	_____
Pensions: RRSP/RRIF/Annuities	<input type="checkbox"/>	_____
Canada Pension	<input type="checkbox"/>	_____
Old Age Security	<input type="checkbox"/>	_____
Employer T4	<input type="checkbox"/>	_____
Foreign sources	<input type="checkbox"/>	_____
Business (please complete schedule which can be found at www.blrcpa.ca):	<input type="checkbox"/>	_____
Rental property (please complete schedule which can be found at www.blrcpa.ca):	<input type="checkbox"/>	_____
Capital gains/losses:	<input type="checkbox"/>	_____
- Sale of investments - provide information on original cost, proceeds, expenses, dates		
- Broker statements or summaries would be very helpful	<input type="checkbox"/>	_____
- Annual statements from Mutual Fund companies		
Other income (please provide details on separate page):		
- Spousal support	<input type="checkbox"/>	_____
- Lump sum pensions	<input type="checkbox"/>	_____
- Other sources of income for which no slips were received.	<input type="checkbox"/>	_____

CHECKLIST CONTINUED:

Additional information

'X'

DEDUCTIONS

RRSP contributions: receipts required

Union or professional dues: (if not included on your T4)

Child care: Please provide name, address and SIN if applicable
If your child attended an overnight camp please provide the number of weeks at camp.

Carrying charges: interest
management fees

Employment/commission expenses (complete employment expense schedule (www.blrcpa.ca) and include T2200 from your employer)

Spousal and child support payments (please provide breakdown)
Moving expenses (please contact us)

NON-REFUNDABLE TAX CREDIT INFORMATION

Tuition fees for self or dependants
- please have dependants sign back of T2202A

Medical expenses paid, including health insurance premiums
- please enclose all receipts
- **for prescriptions please consider obtaining a summary from your pharmacy. All pages are required**

Passes for public transit must show users name and proof of amount paid
First-time home buyers' credit (include agreement of purchase and sale)
Charitable donations (include receipts)
Political donations (include receipts)
Interest paid on student loans (official statement required)

PROVINCIAL TAX CREDIT INFORMATION

Rent or property tax paid on principal residence
(obtain and include receipts displaying address and landlord's name if you rent)
(provide copy of final property tax bill if you own)

INCOME TAX INSTALMENTS MADE DURING THE YEAR

Are you a U.S. citizen, a U.S. green card holder or were you born in the U.S.? Yes No

CRA, in conjunction with Elections Canada, is once again asking whether or not you will give your consent to provide Elections Canada with your name, address and date of birth only.

I am a citizen of Canada Yes No

The purpose of this is to keep the National Register of Electors up to date for future elections. Would you please indicate your decision on this matter below.

Yes, consent given No, consent denied